



Webinar

Preparing for the Transition to a Shared Services Model

Sponsored by  **Cornerstone**

October 15, 2019

KNOWLEDGE | RESOURCES | ADVOCACY | CONNECTIONS



Webinar

Chat

*Jennifer: Welcome to the webinar! You should be hearing audio streaming through your computer speakers. If you experience technical difficulties at any time, please refresh your web browser by selecting F5 for a PC and Command R for a Mac. You can also send us a message here in the chat box or e-mail cupahr@commpartners.com

Enter your message

Send

Need Help?

Send us a message via the Chat box, or email us at:

cupahr@commpartners.com



Webinar

Chat

*Jennifer: Welcome to the webinar! You should be hearing audio streaming through your computer speakers. If you experience technical difficulties at any time, please refresh your web browser by selecting F5 for a PC and Command R for a Mac. You can also send us a message here in the chat box or e-mail cupahr@commpartners.com

Enter your message

Send

Q & A

Don't forget to submit your questions to our presenters.

How? Click on the Chat box at the bottom left of your screen and be sure to click "send."



Webinar

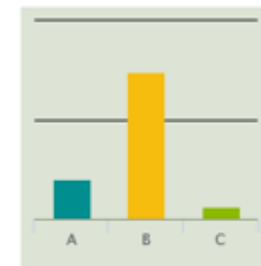
Poll Questions

Click on your screen in the box next to your answer choice.

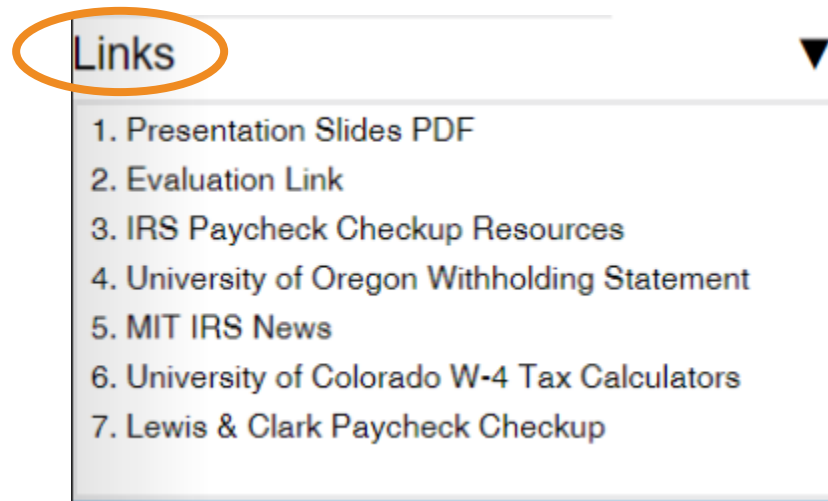
Poll Question

At which stage would you currently place your institution overall when it comes to most strategic decision-making?

- 20% - 1 A Reliant on gut, intuition, experience
- 74% - 19 B Data-informed
- 6% - 2 C Data-driven



Handouts



Available for download in the “Links” section of your dashboard.

Continuing Education Credit

Credit Hours for Webinars

CE credit is issued to registered attendees only and is linked in the evaluation for each webinar.

Questions? E-mail learn@cupahr.org.



cupa·hr™ Webinar

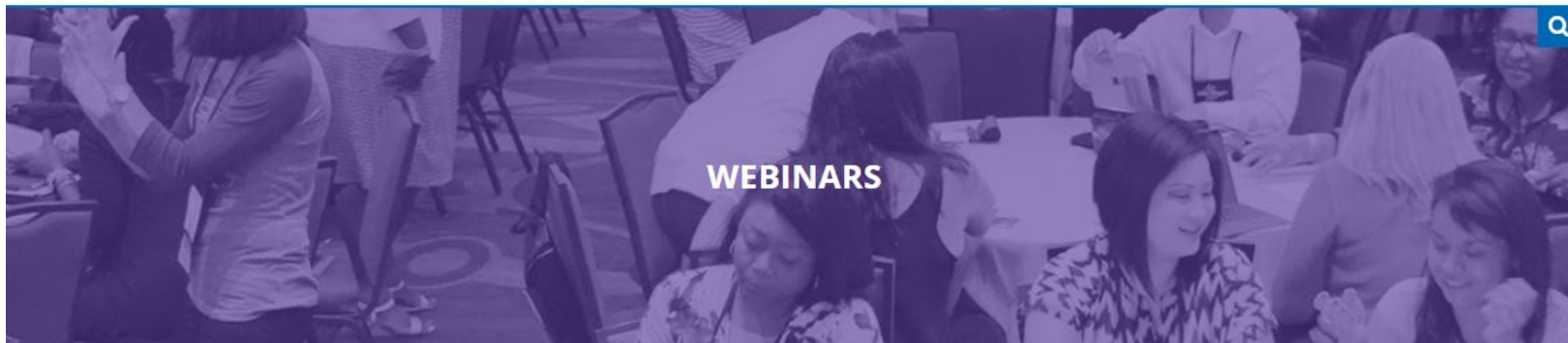
Archived Recording

Visit <https://www.cupahr.org/events/webinars/>



[About Us](#) [Log In](#) [Media](#) [Blog](#) [JobLine](#) [For Volunteers](#) [For Corporates](#)

[KNOWLEDGE CENTER](#) [EVENTS](#) [SURVEYS](#) [ADVOCACY](#) [MEMBERSHIP](#)



KNOWLEDGE | RESOURCES | ADVOCACY | CONNECTIONS



Webinar

Preparing for the Transition to a Shared Services Model

Sponsored by  **Cornerstone**

October 15, 2019

KNOWLEDGE | RESOURCES | ADVOCACY | CONNECTIONS

cupa·hr™ Webinar

Presenters



Lauri Catalano

*Senior Director of Shared
Services*

Penn State University



Clint Eury

*HR Strategic Partner
Penn State University*



Leanne Fuller

*Director of Human Resource
Services*

Auburn University



Ale Kennedy, Ed.D.

*Associate Chief Human
Resource Officer*

Clemson University

KNOWLEDGE | RESOURCES | ADVOCACY | CONNECTIONS

cupa·hr™ Webinar



Leanne Fuller

*Director of Human Resource
Services*



KNOWLEDGE | RESOURCES | ADVOCACY | CONNECTIONS

Learning Objectives

- What is a shared services model ?

- Why consider a shared services model ?

- How do I plan for developing HR Shared Services model ?
 - Stakeholder Buy-in and involvement
 - Planning for what function(s) to centralize
 - Communications strategy
 - Prepping the Campus

Introduction

Webinar

- Part 1 of a Part 2 Series (Spring, 2020)

A HR Shared Services model

- Creates standardization of practices;
- Streamline processes;
- Ensure consistency of HR practices; to
- Efficiently serve employees

HR Shared Services in Higher Education

- Various models
- Dependent on your needs of your campus

Introduction (continued)

Focus of webinar on *some* of the considerations in planning phase

Three institutions – different stages

- Auburn University
- Clemson University
- Pennsylvania State University

Panel Q & A

- Send in your questions, via the chat feature, during the webinar

Poll Question

Is your institution considering a HR shared services model?

- a) Yes
- b) No
- c) Maybe

Poll Question

If your institution is proceeding, what phase/stage are you in with your shared services model?

- a) Conducting Research
- b) Presenting plans to stakeholders for buy-in
- c) Designing processes/functions
- d) Implementation of a software platform
- e) Communication planning and strategy
- f) Fully implemented shared services model
- g) Assessment and feedback for continuous improvement



About Auburn University



**13,000
employees**

*Full-time, part-time,
temporary, and student*



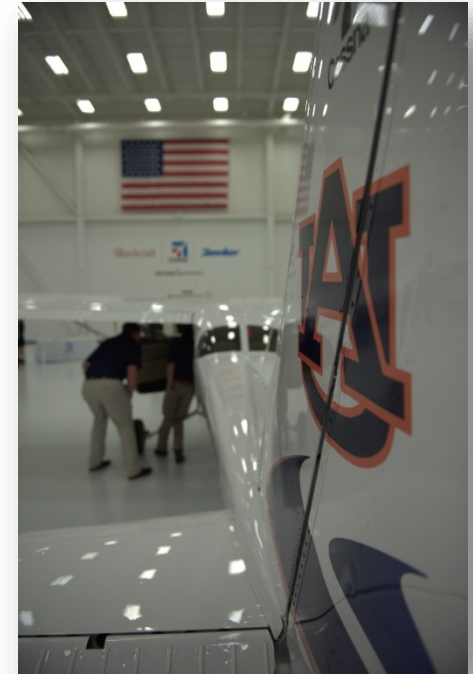
**30,000+
students**

*(19:1 student/faculty
ratio)*



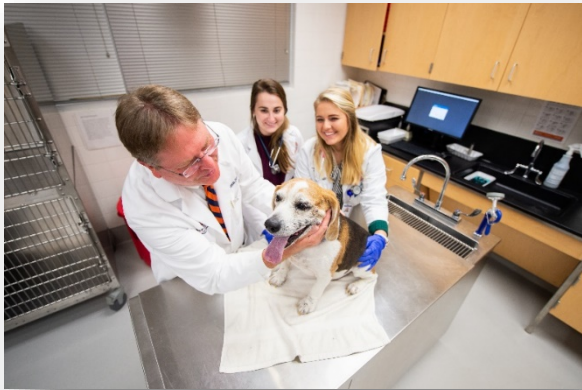
**Carnegie R1
Designated University**

Alabama's Land-Sea-Space Grant University



In 1872, under the Morrill Act, Auburn became the first land-grant college in the South.

Professional Programs



**Veterinary
Medicine**



Pharmacy



Aviation

Our Creed



*“... I believe
in Auburn
and love it!”*

Shared Services Model – AU Onboarding Center

Why?

- WELCOME experience!
- Begin assimilation into culture, values, and norms
- Centralize paperwork for consistency
- Compliance-driven for Form I-9 and E-Verify completion
- Onboarding platform implementation
- Provide resources to new employees for engagement opportunities
- Retention and turnover costs
- Efficiency opportunity for earlier entry into HRIS system



Where Are We Now?

- Space construction
- Hiring center staff
 - Manager
 - 3 Onboarding Specialists
 - 1 Onboarding Coordinator
- Planning for system platform implementation
- Stakeholder input
 - To build processes, protocols, assessment, and survey tools
- Live date - TBD



Construction photos



- Approximately 1,500 square feet
- Two doors down from our office complex
- Estimated completion date: mid- to late December 2019

Research

CUPA -HR

- <https://www.cupahr.org/blog/all-things-onboarding/>

Harvard Business Review

- <https://hbr.org/2018/12/to-retain-new-hires-spend-more-time-onboarding-them>

National Business Research Institute

- <https://www.nbrii.com/employee-survey-white-papers/onboarding-is-critical-to-business-success/>



cupa·hr™ Webinar



Ale Kennedy, Ed.D.
*Associate Chief Human
Resource Officer*



KNOWLEDGE | RESOURCES | ADVOCACY | CONNECTIONS

FORWARD

CLEMSON®
HUMAN RESOURCES

**TAKING HR TO
THE NEXT LEVEL**



Purpose for the HR's New Model

- Better serve our customers- academic and non-academic
- Improve efficiency and effectiveness
- Create internal opportunities for the HR team via career progression and talent development
- Provide subject matter experts the opportunity to focus on strategy and initiatives
- Recruit and develop HR consultants who will provide proactive partnerships with the Deans, Division Directors, and Business Lines

Clemson HR Over the Past 6 Years

2013

- Non-HR personnel performing HR functions in field

2014

- Reporting structure created to form HR Partners (remain in field)- report to HR

2017

- HR Leadership Team is challenged to develop a new service model and HR structure (steps next slide)

2018

- HR Partners change from being embedded in field to working in one centralized Service Center – Announcement of new model to the campus

2019

- Continuously working on best practices and improved processes

The Process of Selecting a New Model

Identified goals, reviewed pros and cons, and conducted SWOT analysis

Researched industry and peer institution HR models—including HR taxonomy

Conducted resource gap analysis

Identified additional resources needed

Conducted compensation analysis for existing team

Developed strategic customer service model and processes

Project put on hold until CHRO hired

The HR*Forward* Model



A Four-Level Service Structure

Service Level 1 Self Service Transactions

- Updating employee contact info
- Viewing paychecks
- Changing deductions
- Reviewing HR policies
- Submitting basic HR questions

Service Level 2 HR Service Representative

- Create job openings and offer letters
- Partner with payroll to process special pay
- Process reference checks, background checks and new hire paperwork
- Update position descriptions
- Answer incoming questions from employees and supervisors; process Ask-HR tickets
- Log and complete incoming transactions, escalating when necessary
- Provide data from PeopleSoft (queries)
- Assist customers with completing forms

Service Level 3 HR Service Generalist

- Approve offers for new hires and assist with onboarding of new employees
- Assist with Employee Relations issues
- Process compensation analyses and make job classification and FLSA decisions
- Assist with training development and delivery to employees as necessary
- Assist with developing and implementing strategic plans
- Assist with improving HR processes

Service Level 4 Strategic Consultant

- Create strategic plans - 3-5-year plans
- Organizational design and development
- Long term planning and budgeting
- Training needs assessment
- Guidance on HR processes
- Leads deployment of HR initiatives

[Home](#) > [HR Home](#) > [Contact Us](#) > [HR Service Teams](#)

Welcome to HR Services

Find Your HR Contacts

Clemson University employees: Select your budget center to search for the Human Resources team that supports your unit.

Select Budget Center

Your primary contact is your HR Generalist and HR Service Representative for daily HR questions and processes. Select their title to view an example of duties performed by each service team member.

Examples of Services Provided

Service Level 1: Self Service (transaction performed by the employee) ▼

Service Level 2: HR Service Representatives ▼

Service Level 3: HR Generalists ▼

Service Level 4: HR Strategic Consultant ▼

HR Services - Leadership Contacts



Dr. Ale Kennedy
ACHRO, HR
Services
alekenn@clemson.edu
656.9407



Jamie Byrne
HR Solutions
Director
(HR Generalists)
jbyrne@clemson.edu
656.9056



Michelle Turner
HR Service Lead
(HR Service Reps)
mturner@clemson.edu
656.1263



Ashley Love
HR Solutions Lead
sherid4@clemson.edu
656.7249



Expected Long Term Benefits of the HR*Forward* Model

Customers will better understand HR service levels

Consistent HR processes for customers and HR team to follow



Team of HR experts versus one point of contact

Quicker response time for customers

Reduction in hand-offs

Career progression and cross training will help retain employees



Proactive services like workforce design and organization planning added

HR will have a seat at the table when critical decisions are being made

Cost efficiencies with shared services concept



Structure allows for proactive and strategic support of University-wide initiatives

Takeaways

- Scalable solutions are out there
- Current state analysis; identify issues—why isn't the current model working and what has to change?
- Conduct SWOT and gather feedback
- Review HR taxonomy
- Identify resources needed to help with reorganization
- Identify business processes being provided or not being provided—which are critical vs. nice to have?
- Must get leadership buy-in AND funding
- Gain support from team and customers
- Communicate, communicate, communicate
- Change Management training, job aids, FAQ
- Engagement activities
- Measure success, obtain feedback, adjust
- Do it!



HR Support in 2019 ... By The Numbers

Clemson HR made tremendous progress in FY19 with a centralized restructure, the creation of an online employee dashboard with 5 year trends and real time metrics, innovative process and system enhancements, and more! We are on our way to becoming the #1 HR team in higher education!



147,461

#ClemsonWorks social media interactions

35,000

job applications

27,323

employee transactions processed

10,683

staff, faculty and student workers on payroll

1,470

faculty and staff trained

1,008

HR #ServeOthers volunteer hours

996

employee referrals

841

new hires

562

supervisors attended Supervisor Training

132

international hires

132

HR-led classroom training sessions

26

HR policies revised and updated

21

new employee orientation sessions

17

spousal placements

11

new executive hires and/or promotions

cupa·hr™ Webinar



Lauri Catalano
Senior Director of Shared Services



Clint Eury
HR Strategic Partner



PennState
Human Resources

KNOWLEDGE | RESOURCES | ADVOCACY | CONNECTIONS

About Penn State



Pennsylvania's

- Sole land grant institution
- Largest public university
- Largest non-government employer



- 24 campuses and online
- 99,000 students
- 45,000 employees



- Operating budget: \$6.8 billion
- E&G General Funds budget: \$2.5 billion
- Economic Impact: \$11.6 billion



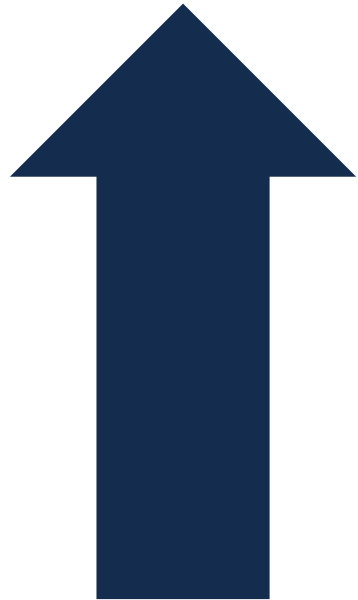
- Hospital
- Airport
- Two hotels
- Two law schools

Poll Question – What Benefits Are You Hoping to Achieve with a Shared Services Function ?

Select All That Apply

- Improve Customer Experience/Employee Engagement
- Improve Consistency
- Increase Scale
- Increase Compliance and Oversight
- Increase Productivity
- Improve Organizational Stability
- Reduce Risk
- Realize Savings
- Streamline Processes
- Other

Why Shared Services?

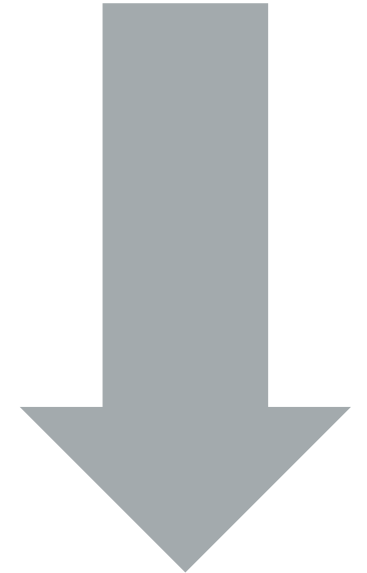


IMPROVE

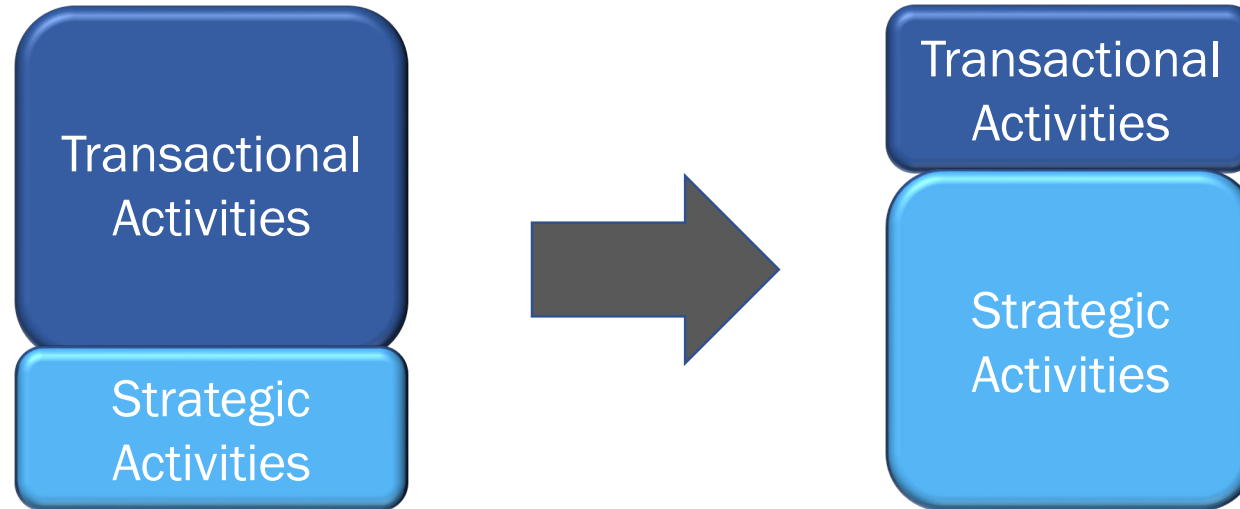
- Customer service
- Consistency
- Compliance and oversight
- Scalability
- Organizational sustainability
- Productivity

REDUCE

- Decentralized transactional work
- Process overlap
- Reactive behaviors
- Risk



Effect of Shared Services Model on HR Organization and Institution



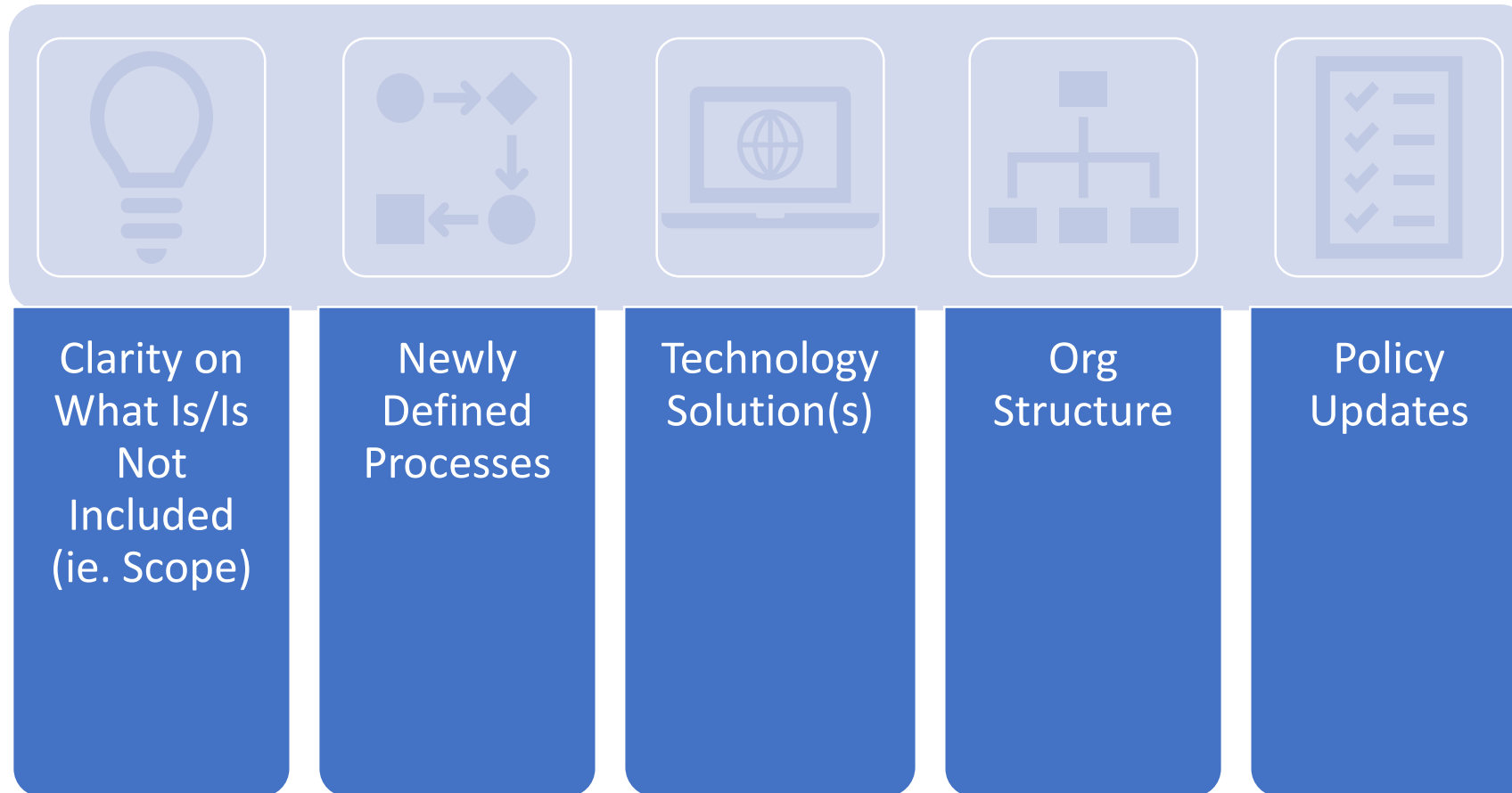
Poll Question - What Functions Are You Including/Do You Hope to Include within Shared Services?

Select All That Apply

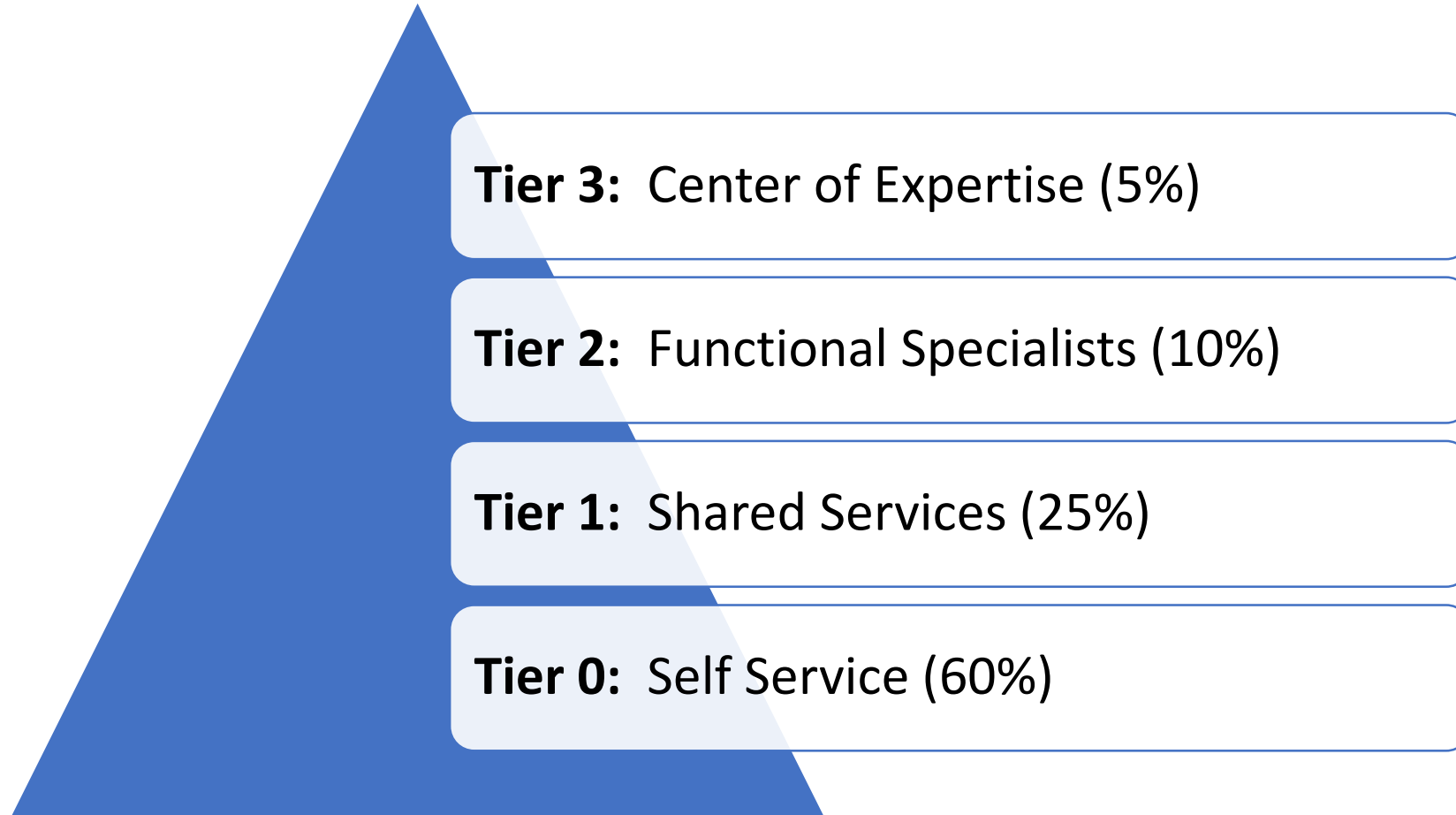
- Hiring/Talent Acquisition
- Onboarding
- Health/Welfare Benefits
- Retirement Benefits
- Absence Management/Leave Administration
- Workforce Administration (Lifecycle Transactions)
- Payroll
- Performance Management
- Learning
- Compensation
- Compliance and/or File Management
- Timekeeping
- Other

What Functions Are You Including/Do You Hope to Include within Shared Services?

There is no right or wrong function to include, but you will need to consider:



Customer Engagement Model – Tiered Structure



Questions?



Lauri Catalano
lmc68@psu.edu



Clint Eury
cee126@psu.edu



Leanne Fuller
fullele@auburn.edu



Ale Kennedy, Ed.D.
alekenn@clemson.edu

HR Shared Services Part 2, TBD - Spring 2020

Including HR Shared Services topics on:

- Assessment
- Decision-making
- Strategy



Thank You!

Preparing for the Transition to a Shared Services Model

October 15, 2019

Sponsored by  **Cornerstone**

The logo for Cornerstone, featuring a blue square with a white circle inside, followed by the word "Cornerstone" in a bold, blue, sans-serif font.

KNOWLEDGE | RESOURCES | ADVOCACY | CONNECTIONS